



Spherically Desktop User Manual



Spherical Desktop User Manual

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NOTICES

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USING THE TELEPHONE

We welcome you as a new user of the Spherical Desktop. As a Spherical Desktop phone user, you must learn a few basics to get started with the Spherical Desktop.

This manual is designed with you in mind. If you follow each of the steps, you can answer, transfer, place, receive, or conference calls with the Spherical Desktop. Refer to your voice mail vendor's user manual for any questions regarding voice mail system functionality.

Note: Some of the Spherical Desktop features are dependent upon what your system administrator has enabled for your particular phone. Please ask your system administrator for details about your organization's Spherical system.

SPHERICAL DESKTOP PHONE FEATURES

Distinctive Ringing

If a call comes to your phone from within your organization's Spherical system, you will hear two short rings. If a call comes to your phone from outside your organization's Spherical system, you will hear one long ring.

Caller ID

If your Spherical system has Caller ID enabled, the caller's information will appear on your display phone. If the caller does not have Caller ID, no information will be displayed. If your Spherical system has not been enabled for external Caller ID, you will only receive Caller ID information on internal calls.

USING THE TELEPHONE

Placing Calls from the Telephone

Call Waiting

If your phoneset has been enabled for call waiting, a tone sounds in your handset when another call is coming in while you are on the current call. Press the FLASH/LINK key on your telephone to access the second call.

Message Waiting

If your telephone is equipped with a message waiting light and the administrator has enabled this feature, the light flashes when a message is waiting in your voice mailbox. A stutter dial tone may also sound to indicate you have a message when you pick up the handset.

PLACING CALLS FROM THE TELEPHONE

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How do I place a normal call?

To place an external call

- 1 Pick up the handset.**
- 2 Dial the outside service number (typically 9).**
Outside service your Spherical system uses: _____
- 3 Dial the number you wish to call.**

To place an internal call

- 1 Pick up the handset.**
- 2 Dial the extension.**

PROGRAMMABLE PHONES

Programmable phones can be used in your Spherical system. Program each number by first inputting the outside service then the desired number (for example, 97777777).

ANSWERING CALLS FROM THE TELEPHONE

The phone associated with the Spherical Desktop operates just like any other phone: if it rings, you answer it!

To answer a call

The phone rings...

- 1 **Pick up the handset.**

The Spherical Desktop supports distinctive ringing, Caller ID, and call waiting.

PLACING A CALL ON HOLD

If your telephone has no HOLD button, use the following procedure:

To place a call on hold using FLASH/LINK

- 1 **Press FLASH/LINK on the telephone to place the call on hold.**
- 2 **Press FLASH/LINK on the telephone again to retrieve the call from hold.**

The only way a caller hears music on hold, if your organization incorporates music on hold into its Spherical system, is if you press the FLASH/LINK button on the telephone. If you place the caller on hold using the HOLD button, the caller will *not* hear music on hold.

TRANSFERRING CALLS FROM THE TELEPHONE

Once I have answered a call, how do I transfer it to another extension?

USING THE TELEPHONE

Conferencing Calls Using the Telephone

Blind Transfer

Immediate transfer to other extension.

Attended Transfer

Allows you to announce the call prior to the transfer. When using attended transfer, the caller being transferred does not hear you announce the call. If your system has music on hold, the caller hears music during the transfer.

Note: A blind transfer can be completed by using star codes. This option may be preferred when used with a programmable phone. Refer to the Star Code table for further information.

To complete a call (a blind transfer)

- 1 Press **FLASH/LINK** on the telephone.

You will hear dial tone.

- 2 Dial the extension.

The transfer is complete when you hear dial tone.

- 3 Hang up the handset.

Your phone is set by default to blind transfer. You can change this setting with your Spherical Desktop.

To complete a call (an attended transfer)

- 1 Press **FLASH/LINK** on the telephone.

- 2 Dial the extension.

- 3 Announce the call.

- 4 Hang up the handset to complete the transfer.

CONFERENCING CALLS USING THE TELEPHONE

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Now that I am talking to someone, how do I conference another person into our call?

To place a conference call

With one call already connected:

- 1 Press FLASH/LINK on the telephone to place the current call on hold.
- 2 Dial the extension number or an outside number (outside service plus the desired number).
- 3 Press FLASH/LINK to place the new call on hold.
- 4 Dial *95.

The conference call is now in progress.

- You may conference yourself plus five other callers in a conference call depending on available resources.

SPHERICALL PHONESET STAR CODE
COMMANDS

The Spherical Desktop is enabled with several star code commands that you can use directly from the phoneset. Use the following star code commands to set features and perform functions from any telephone.

Table 1.1 Star Codes

Code	Action	Explanation
Authorization PIN	*99 + PIN + # + number to be dialed	Allows you to apply permissions from your user profile to another line and make calls from a phone.
Blind Transfer	FLASH/LINK + *96 + Extension	Complete a blind transfer to another extension.

USING THE TELEPHONE

Spherical PhoneSet Star Code Commands

Code	Action	Explanation
Call Forwarding Setup	*72 + number + # (optional)	Activates the station number to which all your calls will be forwarded. <ul style="list-style-type: none"> The number can be an extension or outside service + local telephone number (example: 9 + 555-1234). If the number is not already on the forwarded list, it will be added and enabled. Only a single handset-entered forwarding number is entered at a time; though calls may be forwarded to multiple numbers (example: *72 + extension, hangup. Then, *72 + another extension).
Call Forwarding Deactivation	*73	Clears the phone's pre-existing call forwarding setup.
Conferencing	With a call connected: Press FLASH/LINK Dial extension or number Press FLASH/LINK Dial *95	FLASH/LINK and star code allows user to conference parties.
Do Not Disturb Activation	*78	Activates Do Not Disturb for all calls bound for this phone extension. When Do Not Disturb is activated, the station is not alerted to any calls. Forwarding and/or Coverage behaves as usual.
Do Not Disturb Deactivation	*79	Deactivates Do Not Disturb for all calls bound for this phone line.
Pickup	*93 + Extension	Retrieves a ringing call or an on-hold call at the entered extension.
Group Pickup	*92	Retrieves a ringing call from anywhere within the predefined Group Pickup area.
Park	FLASH/LINK + *8 + the number of park zone as announced (by operator)	Places a call into the "virtual" park zone (a "hold" parking lot where calls can be retrieved from any phone on the system).
Unpark	*91 + park zone as announced (by operator)	Retrieves a call from the park zone extension entered. If there is more than one call in the zone, it will take the oldest call in the zone.
Paging	Number determined by your Spherical system administrator.	Contact your administrator for the extension of your system's paging access.

FLASH CODES FOR TELEPHONE FUNCTIONALITY

The Spherical system uses the FLASH/LINK function on the telephone set to enable a single-line phone to function as a multi-line phone.

Pressing the FLASH/LINK key on the phone set allows you to “toggle” or cycle between calls to transfer or make consultative calls.

Table 1.2 Flash/Link function table

Action	Flash Explanation
Making a call <ul style="list-style-type: none">• Pick up your phone receiver• Dial the number you wish to call	N/A
Placing a call on/off Hold	<ul style="list-style-type: none">• Press Hold on the phoneset (no music on hold).or• Press FLASH/LINK (music on hold, if available).
Dialing an Outside Number	_____ (outside service provided by administrator)
Answering an incoming call while the phone is already off-hook (A call waiting tone will be generated)	Press FLASH/LINK.
Placing a call on Hold to make a second, third, fourth, etc. call (The maximum number of calls allowed is determined by your system administrator.)	Press FLASH/LINK, wait for dial tone, dial another number.
Retrieving a second, third, fourth, etc. call on Hold	Press FLASH/LINK until the desired party is connected. <ul style="list-style-type: none">• Continue to press FLASH/LINK to cycle through the calls as they were presented to you.• Pressing FLASH/LINK will provide dial tone to allow you to manage the last connected party (i.e. for transfer, conference, call parking, etc.). If upon call waiting, you will press flash and receive a call immediately without the dial tone.
Transferring the connected party (Attended Transfer)	Press FLASH/LINK, dial the extension, announce the call, hang up. <ul style="list-style-type: none">• A hold reminder, a very brief ring, will notify you if you have left another call on hold. Pick up the phone to connect to the next person on hold.

Action	Flash Explanation
Transferring the connected party (Blind Transfer)	Press FLASH/LINK, dial the extension, hang up. <ul style="list-style-type: none"> A hold reminder, a very brief ring, will notify you if you have left another call on hold. Pick up the phone to connect to the next person on hold.

AUTHORIZATION PINS AND THE PHONESSET

AUTHORIZATION PIN OVERVIEW

Authorization PINs allow you to apply permissions from your assigned user profile to initiate calls from a restricted phone.

To use your dialing permissions from a restricted phone, dial *99 + PIN + # (the # key). The dialing privileges that correspond to your PIN (your user profile) will apply to the current call. After the call is complete, the phoneset permissions return to their normal privileges associated with the line.

If you are dialing out from the Spherically Desktop on your computer, you will already have permission to make calls. As long as you are logged into your computer and the Spherically Desktop is open, you will have your dialing permissions.

Table 1.3

PIN Code Sequence

Dial:	
*99	Begins dialing permissions.
PIN + # (the # key)	Enters your security access.
Number	Dials a phone number (local or long distance).

USING THE TELEPHONE

Authorization PINs and the Phoneset

Note: Your system administrator will supply you with your Authorization PIN if this feature is active on your system. If you lose your PIN, your administrator must assign you a new PIN.

USING THE TELEPHONE*Authorization PINs and the Phoneset*

SPHERICALL DESKTOP SOFTWARE

How do I use my telephone in conjunction with the Spherical Desktop?

Use this chapter if your Spherical system administrator has integrated your telephone with the Spherical Desktop. The following is an overview of the features you have access to on your computer.

Note: Even if your computer is not turned on, you have access to the telephone and can receive and place calls from your phoneset.

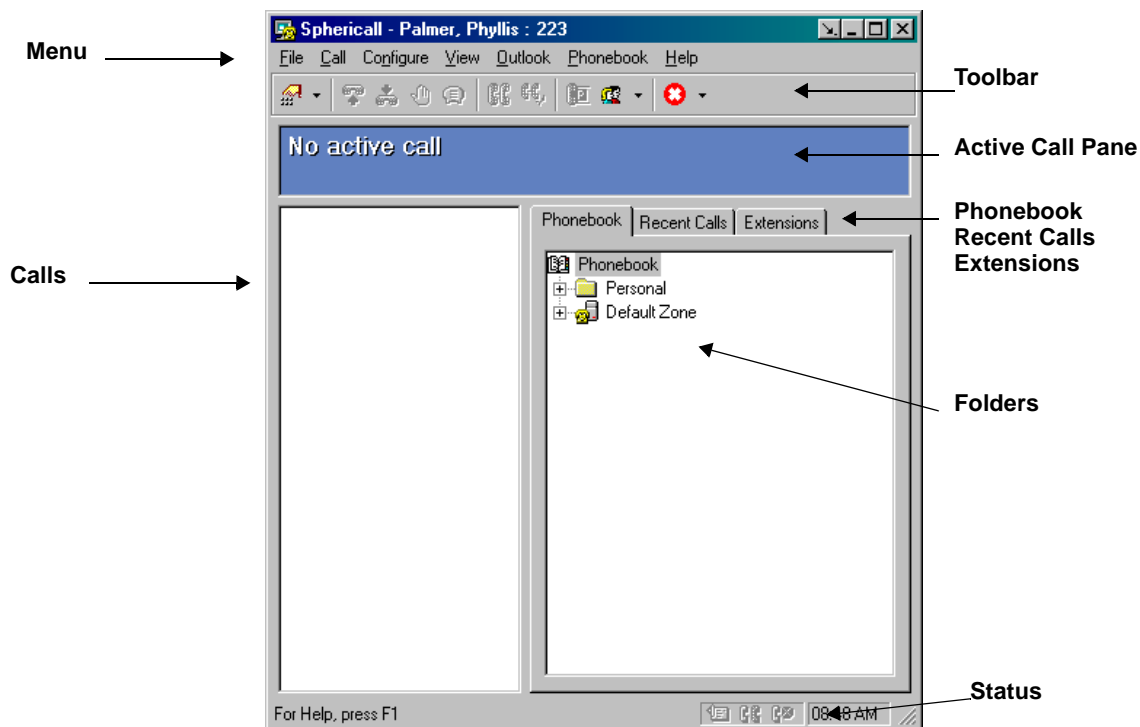
To start the Spherical Desktop application

From the Start menu:

- 1 Click Start\Programs\Spherical\Desktop.

The Spherical Desktop opens and integrates with your phoneset.

Figure 2.1 Spherical Desktop window



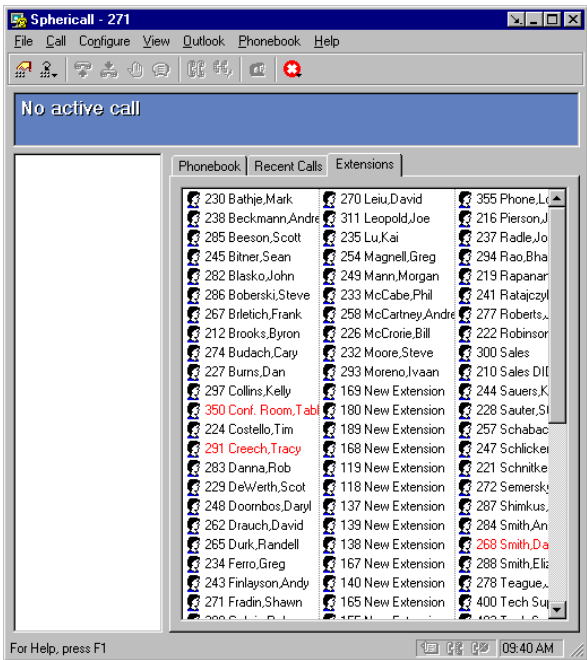
2 Review the following major areas of the window:

Menus	Drop-down menus contain commands and tasks.
Toolbar	Button commands and tasks.
Folders	Stored number information.
Active Call pane	Live information as calls are in process.
Phonebook, Recent Calls, Extensions pane	Phonebooks and organization number directories.
Calls	The active call icon which can be dragged to transfer, right-clicked for more tasks and options, etc.

EXTENSIONS LIST

Clicking the Extensions tab of the Spherical Desktop window allows you to view all the extensions listed for your organization.

Figure 2.2 Spherically window



To place a call using the Spherically Desktop window
From Phonebook or Extensions tab:

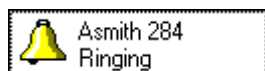
- Double-click any name or number.

USING THE SPHERICALL DESKTOP

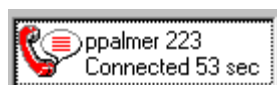
ANSWERING CALLS

In the Calls window, new calls will appear when the telephone rings.

- New calls have a yellow bell ringing.

Figure 2.3 Ringing Bell image

- Connected calls have a *red* handset indicating a call is active.

Figure 2.4 Call Connected image

TRANSFERRING CALLS

To transfer calls using the Spherical Desktop

- 1 Place the call on hold by clicking the hand icon on the Spherical Desktop.
- 2 Double-click the number in the Extensions tab.
or
Drag and drop an active call to a number in the Extensions tab.

Users who transfer calls frequently can also click once in the Extensions tab then type the first letter of the person's last name to whom they wish to transfer the call. This will automatically jump the Extensions list to that alphabetical section. Double-clicking the appropriate name will complete the transfer.

Note: If you have attended transfer set in Configure\Options, you must click Complete Transfer to complete the transfer of a call made from the Spherical Desktop. This is not necessary for blind transfers.

- 3 Hang up the handset.
or
Click the number in the Extensions tab.
- 4 Press Enter.
- 5 Hang up the handset.

The call will be transferred.

To speed transfer calls (for Operators)

Users who transfer calls frequently will find it helpful to "jump" to the alphabetical letter of the person to whom they wish to transfer calls.

- 1 Click once in the “white space” of the Extensions tab.
On the keyboard:
- 2 Type the first letter of the last name of the person to whom you are transferring a call.
This will automatically jump the extensions list to that alphabetical section.
- 3 Double-click the appropriate name to complete the transfer.

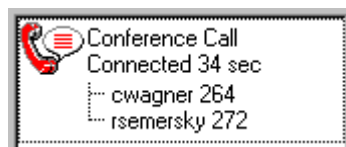
CONFERRING CALLS

Conferencing calls with the Spherically Desktop is very easy to do.

To place a conference call

- 1 Answer or initiate a call.
- 2 Place the call on hold.
- 3 Ring the new extension.
- 4 Drag either call onto the other call in the Calls pane.
The conference call will be connected.

Figure 2.5 Conference Call image



To save a conference call

Once you have a conference call active:

- 1 Click File\Save Conference.

To load a conference call

- 1 Click File\Load Conference.
- 2 Select a previously-saved conference call.
This will load the phone numbers.
or
- 3 Double-click the number to call the party and initiate the conference call.

To transfer a call to a user's voice mailbox

- 1 **Answer a call.**
- 2 **Right-click the extension for the intended transfer.**
- 3 **Click "Transfer to this user's Voice Mailbox."**

The call you transferred will proceed to the voice mailbox.

Note: You must have a third-party voice mail system installed on your Spherically system in order to use this function.

To transfer a call to your own voice mailbox

- 1 **Answer a call.**
- 2 **Right-click your own extension in the Extensions tab.**
- 3 **Click "Transfer to this user's Voice Mailbox."**

The call you transferred will go to your voice mailbox.

Note: You must have a third-party voice mail system installed on your Spherically system in order to use this function.

A NOTE ON OPERATORS

Operators have the ability to monitor more than their own line. Using the Spherically Desktop, an operator can place the mouse pointer over extensions and view user call information. This information includes the caller's name, if the call is inbound or outbound, Caller ID (if available), and call length.

TITLE BAR BUTTONS



Hide button - Click to hide the Spherically Desktop.



Minimize button - Click to reduce the Spherically Desktop image size.



Maximize button - Click to restore the Spherically Desktop to full image size.



Exit button - Click to exit the Spherically Desktop.

The title bar buttons are located at the upper right of the Spherically Desktop.

TASKBAR STATUS AREA ICONS



Status Area Shortcut - Opens the Spherically Desktop window.



Status Area Call Indicator - Indicates call(s) received.



Do Not Disturb - Silences phone.



Forwarding - Indicates that forwarding is enabled.



Message Waiting - Indicates that a message has been left on your third-party voice mailbox (where available).

Taskbar status area icons are located in the lower right of the Spherically Desktop.

SPHERICALL DESKTOP OPTIONS

One of the first things you will need to do with the Spherically Desktop is to set the Configuration Options.

THE OPTIONS WINDOW

GENERAL TAB

To set general options

From the Spherically Desktop window:

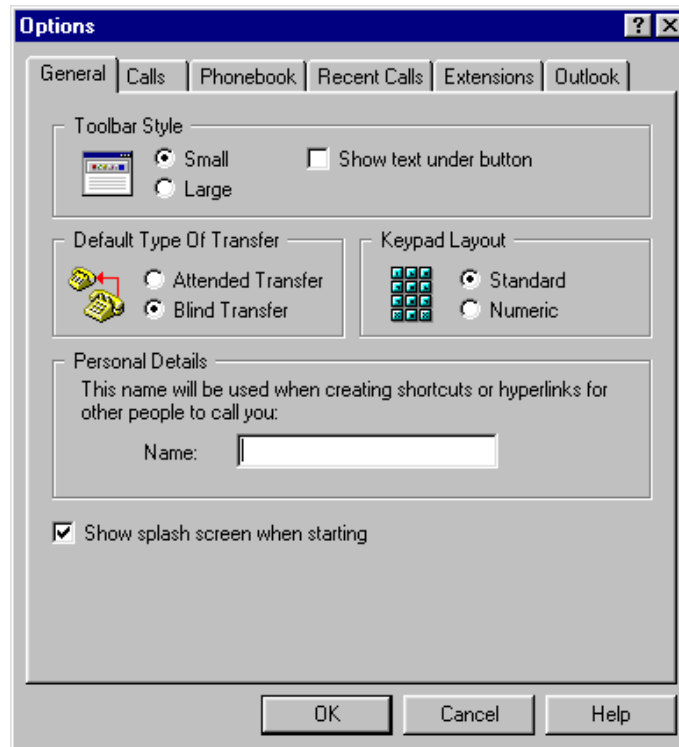
- 1 Click **Configure\Options**.

The Options window appears.

SPHERICALL DESKTOP OPTIONS

The Options Window

Figure 3.1 Options window, General tab

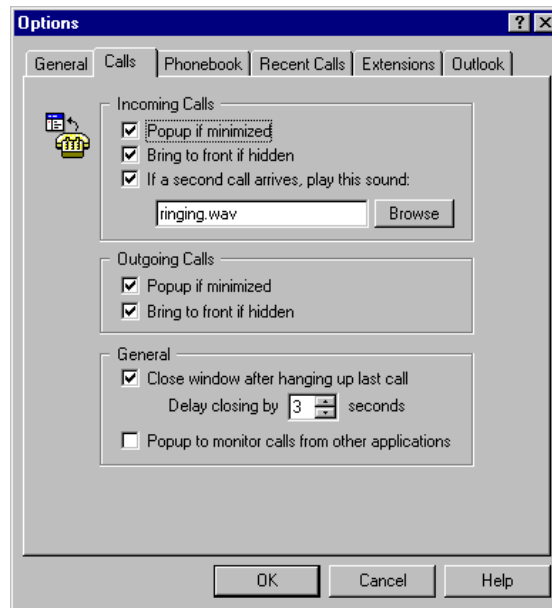


2 Set your own options for the following:

Toolbar Style	Select Small, Large, or Show text under button.
Default Type of Transfer	Select Attended Transfer (allows you to announce transferred calls) or Blind Transfer (immediate transfer).
Keypad Layout	Select Standard or Numeric for the dial pad layout.
Personal Details	Type your name in the Name field.
Show splash screen when starting	When the Spherically Desktop starts, you can enable or disable the Spherically logo splash.

3 Click the Calls tab.

Figure 3.2 Options window, Calls tab



4 Set your own options for the following:

Incoming Calls

Configure Popup and sound options.

Outgoing Calls

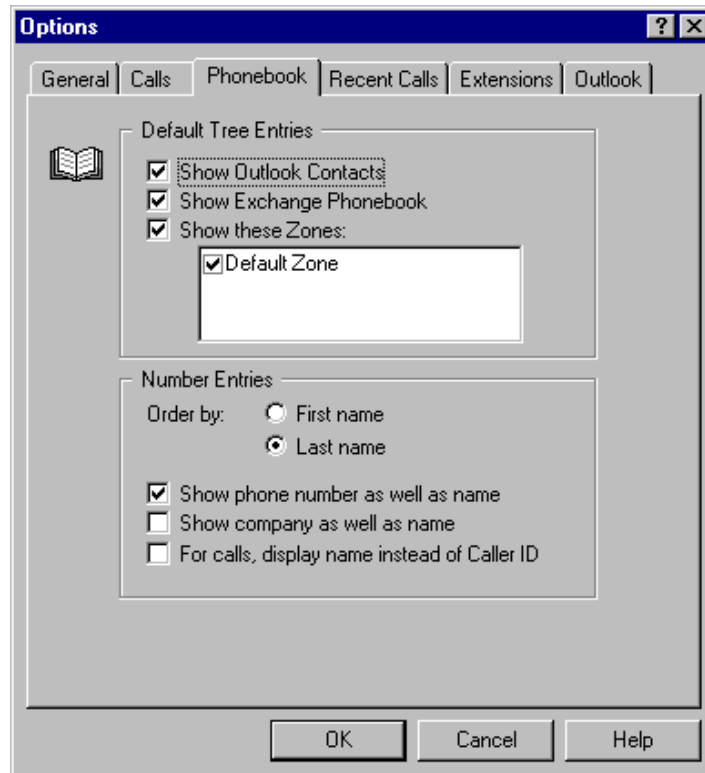
Configure Popup options for outbound calls.

General

Close window and monitor options.

5 Click the Phonebook tab.

Figure 3.3 Options window,
Phonebook tab

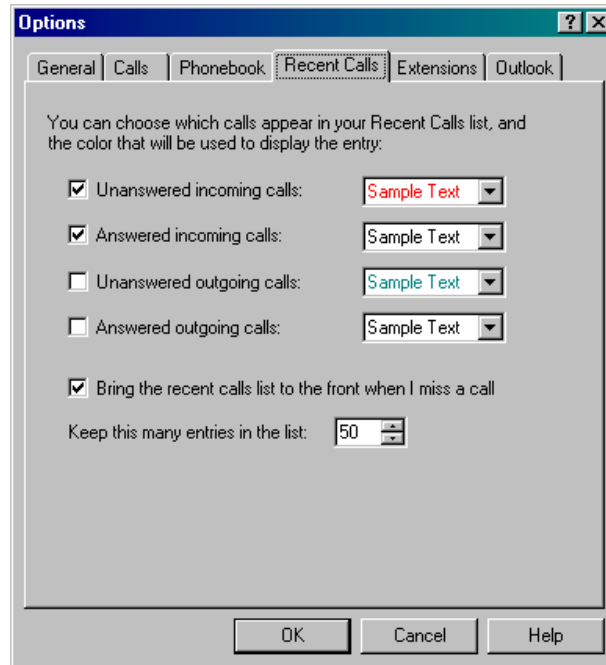


6 Set your own options for the following:

Default Tree Entries	Select how you wish to view calls in the Phonebook.
Number Entries	Select how you wish to sort the calls by first or last name.

7 Click the Recent Calls tab.

Figure 3.4 Options window, Recent Calls tab



8 Set your own options for the following:

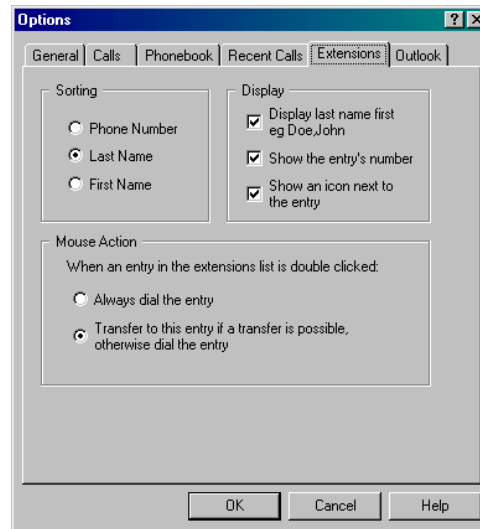
Unanswered incoming calls	Choose which calls appear in Recent Calls list and the list display color.
Answered incoming calls	Choose which calls appear in Recent Calls list and the list display color.
Unanswered outgoing calls	Choose which calls appear in Recent Calls list and the list display color.
Answered outgoing calls	Choose which calls appear in Recent Calls list and the list display color.
Recent calls list	Select to bring recent calls list to front when a call is missed.
Number of entries in list	Choose the number of entries for the Recent Calls list.

9 Click the Extensions tab.

SPHERICALL DESKTOP OPTIONS

The Options Window

Figure 3.5 Options window, Extensions tab



10 Set your own options for the following:

Sorting

Set your sorting option by selecting one of the following:

- Phone Number
- Last Name
- First Name

Display

Set your Display option by selecting one of the following:

- Display last name first
- Show the entry's number
- Show an icon next to the entry

Mouse Action

When an entry in the Extensions list is double-clicked, how do you want the Spherically Desktop to respond?

- Always dial the entry
- Transfer to this entry if a transfer is possible, otherwise dial the entry (preferred method for operator functionality)

A NOTE ON THE OUTLOOK TAB

Microsoft Outlook is only used with systems which are integrated with Microsoft Exchange Server. If your system is integrated with Microsoft Outlook, you can click the Outlook tab on the Spherically Desktop to select and set your preferences for importing Outlook Contacts, Journaling, etc.

INTEGRATION WITH OUTLOOK DIALER

In order to fully integrate with Microsoft Outlook's dialer, you must perform the following configurations:

To configure a PC for Spherically and Microsoft Outlook integration

On a Microsoft Windows 9x or NT Workstation:

Step	Action
1	Open Control Panel\Telephony\Telephony Drivers.
2	Select Spherically Service Provider.
3	Click Configure.
4	Click OK to confirm that TAPI service provider has been configured.
5	Under the My Locations tab, type the outside service (i.e. 9, 8, etc.) required to place calls to the PSTN.
6	Close the Control Panel window.

On a Microsoft Windows 2000 Professional workstation:

Step	Action
1	Open Control Panel\Phone\Modem Options\Advanced.
2	Select Spherically Service Provider.

SPHERICALL DESKTOP OPTIONS

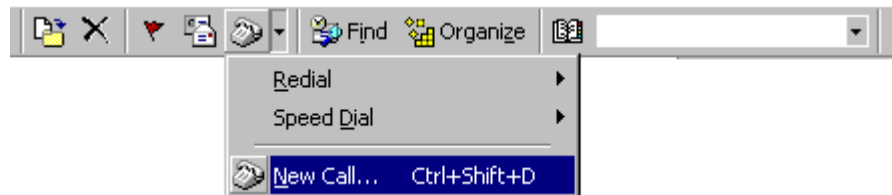
Integration with Outlook Dialer

Step	Action
3	Click Configure.
4	Click OK to confirm that TAPI service provider has been configured.
5	Under Dialing Rule, click edit.
6	Type the outside service (i.e. 9, 8, etc.) required to place calls to the PSTN.
7	Close the Control Panel window.

Then, on any Microsoft Windows 9x, NT, or 2000 Professional workstation:

- 1 **Open the Microsoft Outlook client.**
- 2 **Click Contacts.**
- From the Toolbar:
- 3 **Click Dialer.**

Figure 3.6 Outlook Dialer Button



- 4 **Select New Call.**
- 5 **Click Dialing Options.**
- Under Connect using line:
- 6 **Scroll down to select the appropriate name from the drop-down list box.**
- 7 **Click Dialing Properties.**
- 8 **Verify that the outside service line is set for local and long distance calls.**
- 9 **Click OK**
- 10 **Click OK.**
- 11 **Click Close.**

This desktop is now ready to integrate Spherically and Microsoft Outlook dialing. To test, select a contact and click Dial in Microsoft Outlook. This action invokes the Spherically Desktop and initiates a call.

There is additional information on Microsoft Outlook in the Online Handbook.

FORWARDING AND COVERAGE

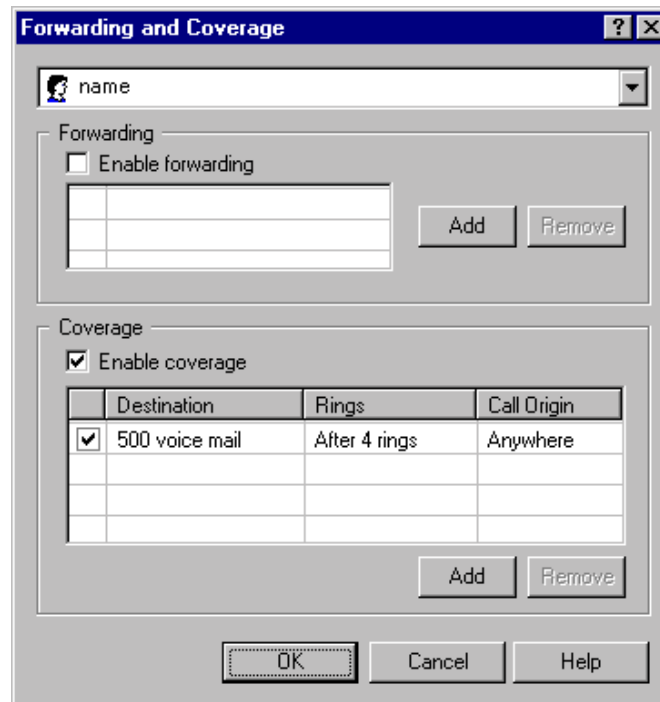
Forwarding and coverage options must be set for each user. If you have the Sphericall Desktop, you can establish the settings for forwarding and coverage yourself.

FORWARDING

Forwarding, or the temporary "follow me" feature of the Sphericall Desktop, rings *both* your extension and the other *internal* extension where the call is forwarded.

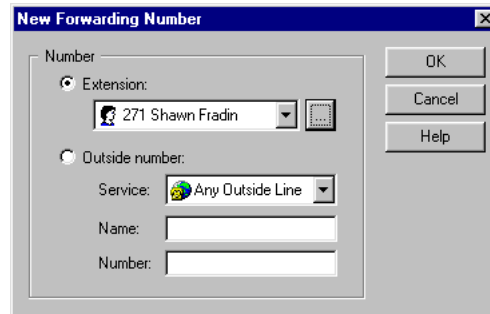
To set forwarding conditions

Figure 3.7 Forwarding and Coverage window



- 1 **Select Configure\Forwarding.**
The Forwarding and Coverage window appears.
- 2 **Select the name and extension for whom you are configuring forwarding conditions from the drop-down list box.**
In the Forwarding group box
- 3 **Select the Enable Forwarding check box to enable forwarding.**
- 4 **Click Add.**
The New Forwarding Number window appears.

Figure 3.8 New Forwarding Number window



- 5 Select the extension or outside number to which you wish to forward calls from the drop-down list box.**
 - If your phone is set to forward to an outside number, it will not ring at your desk phone and the outside number. It will only ring at the number where you have forwarded the call.
 - Once you have enabled either forwarding or coverage to an outside number, the call will not follow any other forwarding or coverage conditions.
- 6 Click OK.**

COVERAGE

Coverage has the added capability of "cascading" call coverage to several different destinations prior to going to your voice mail. Set your coverage for all the options you need:

- Voice mail
- Coverage group (of any kind, depending on your role, job, or duties)
- Cellular phone (if necessary)
- Other individuals within your department

VOICE MAIL SETTINGS

Verify that your coverage settings are set to send your calls to voice mail if you do not answer your phone. Your Spherical system administrator will inform you of your system's voice mail extension number.

To add voice mail settings

From the Rings drop-down list box:

- 1 **Set the number of rings that the phone will ring prior to the call being covered to voice mail.**

ADD COVERAGE SETTINGS

To add coverage settings

- 1 **Click Add to add another coverage setting.**

The New Coverage Number window displays:

Figure 3.9 New Coverage window

- 2 **Select the extension from the drop-down list box.**
- 3 **Click OK to return to the Forwarding and Coverage window.**

Note: Your Spherical system Administrator must give you permission to forward to an outside number.

COVERAGE TO OUTSIDE PHONE NUMBERS

When selecting coverage to an outside phone number, observe the following:

- Type any logical name that makes sense in the Name field.
- Type the number without the outside service (use the default outside service as listed in the Service field above) in the Number field. If your Spherically system has more than one outside service (i.e. one for long-distance calls, one for local calls, etc.), be sure to select the appropriate outside service.

Example:

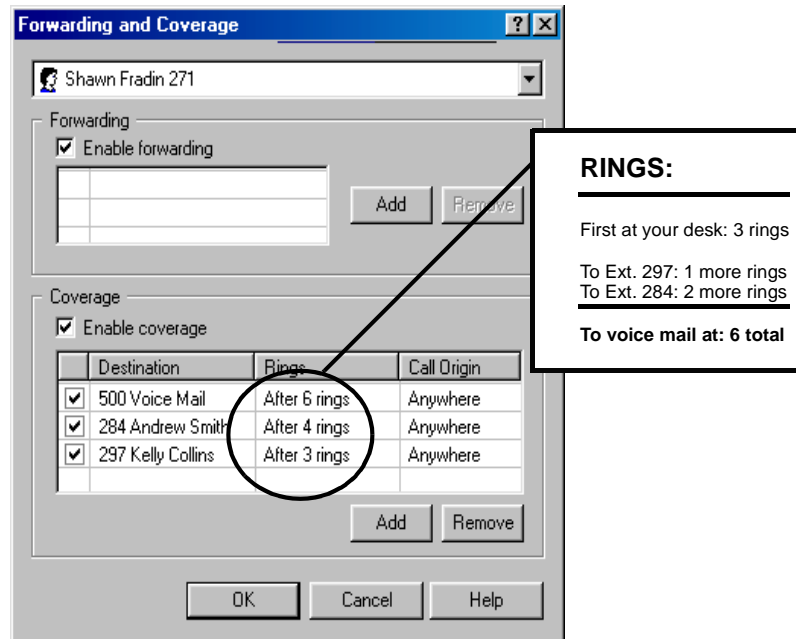
Figure 3.10 Outside number option

The screenshot shows a dialog box titled 'Spherically Desktop Options' with a 'Help' button in the top right. It contains two sections, each with a radio button labeled 'Outside number:'. The top section is pointed to by a box labeled 'Typically'. It has a 'Service:' dropdown menu set to 'Any Outside Line' (with a globe icon), a 'Name:' text field containing 'Home', and a 'Number:' text field containing '5888059'. The bottom section has a 'Service:' dropdown menu set to 'Any Outside Line' (with a globe icon), a 'Name:' text field containing 'Cell Phone', and a 'Number:' text field containing '713-588-8059'. A callout box with an arrow pointing to the 'Number:' fields of both sections contains the text: 'Numbers entered here can be entered as local or long-distance. No outside line access number needed.'

CASCADING COVERAGE

Cascading your coverage to different destinations prior to the call(s) going to your voice mail assists you in managing your calls.

Figure 3.11 Forwarding and Coverage window



ADD DESTINATIONS TO YOUR COVERAGE

Once all destinations are added, set the rings for each destination so that each destination has a unique number of rings.

Example:

- Calls ring first to your phone: 3 rings.
- Then to any other covered number(s): 1 more ring for ext. 297; 2 more rings for ext. 284.
- The call moves to voice mail after the total number of rings listed in voice mail: 6 total rings.
- If you do not have voice mail coverage set, a call ringing your phone will continue to ring; or, the phone will ring the designated number of rings then ring to any coverage numbers listed. The call will ring the final coverage number (highest number of rings) until it is answered.

CALL ORIGIN

Calls can also be sorted for coverage based on the origin of the call. If a *direct* call to your phone set has an EXTERNAL origin and you prefer that those calls get covered differently from INTERNAL calls, set up your coverage to account for internal or external origin calls.

To set coverage for origin calls

- 1 Select the appropriate origin from the Call Origin drop-down list box.

MULTIPLE EXTENSIONS WITH FORWARDING AND COVERAGE

At the top of the Forwarding and Coverage window is a drop-down list box with your name in the user field.

To set multiple extensions

If you have been given "ownership" of more than one extension or group extension:

- 1 Click the drop-down list box with your name in the user field to view each of the lines of which you have ownership.

For example, it is common for one user in a Sales or Support group to have ownership of the Sales or Support number; this person can set its forwarding and coverage options.

- 2 Set the forwarding and coverage options for that extension.
- 3 Click OK to return to the main Spherical Desktop window.

Note: Forwarding is a temporary setting whereas coverage is permanent.

DO NOT DISTURB

The Do Not Disturb button on the toolbar of the Spherical Desktop window allows you to "silence" your phone: the phone will not ring at your desk. All calls go directly to your forwarding and coverage options.

CAUTION! IT IS EASY TO FORGET THAT YOU HAVE DO NOT DISTURB ACTIVATED. REMEMBER TO DEACTIVATE IT TO RESUME NORMAL CALL ACTIVITY.

PHONEBOOK ENTRIES AND FOLDERS

.....

THE PHONEBOOK PANE

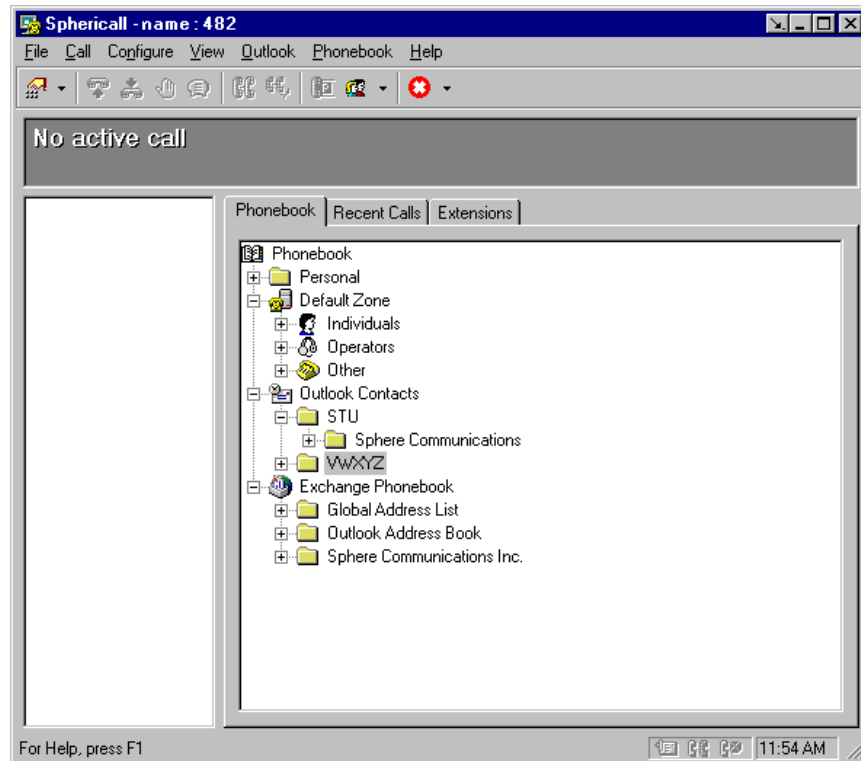
The Phonebook pane on the Spherically Desktop window is used for your personal extensions. By default, extensions on your organization's Spherically system will be listed in a "tree" format. If you expand the tree, you will see all of the users on your system divided by groups.

This allows you to set up your personal folders on your Spherically Desktop. All you need to do to place a call is double-click in the Folders pane. The information in Phonebook folders is stored on your local PC. If you want to transfer those numbers to a new PC, you must contact your Spherically system administrator.

To add a personal folder

- 1 Click the Phonebook tab.
- 2 Highlight the Phonebook directory.

Figure 3.12 Sphercall Desktop window,
Phonebook tab



- 3 Right-click the Personal folder.**
 - 4 Select New Entry.**
- The Phonebook Entry window displays.

Figure 3.13 Phonebook Entry window

Phonebook Entry

Details

First Name: ...

Last Name:

Company:

☐ Image: ...

Numbers

Type	Number
Business	
Business2	
Home	
Home2	

OK

Cancel

Help

5 Enter the following options:

First Name	Type the first name.
Last Name	Type the last name. If only using one word, type the word here (i.e. Home).
Company	Optional field.
Image	Optional field. If you have a bitmap image of someone, select that check box, then browse to find the image. This image appears in the Active Call pane.
Number	Type the number. You do not need to add the service number (i.e. 9 for outside service). You will need to enter the full area code if this is a long distance number.

6 Click OK.

You will now see this new entry in the folder you have created. Whenever you call or receive a call from this number, you will see this image in the Active Calls pane.

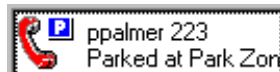
PARK ZONES

The Sphericall system has a number of park zones to aid in placing calls on hold and retrieving them from another phone. Instead of placing a call on hold, you can click Park. This allows you to summon another person to unpark the call by using the Sphericall Desktop or the Star Code *91 plus the park zone number.

To place calls into a park zone

- 1 Right-click the call in progress.
- 2 Select Park.
or
Click Park Zone.

Figure 3.14 Park Zones progress image



To retrieve calls from the Park Zone

- 1 Select the call on Park (identified by Park icon).
- 2 Highlight a call in a park zone.
- 3 Right-click the call.
- 4 Click Unpark.
or
Click Park.

Calls are unparked by first call in, first call out. The person holding the longest in the park zone will be the first caller unparked from a single zone.

PICKUP

.....

The Pickup feature of Spherical Desktop allows you to answer a ringing phone at someone else's desk. If you hear a ringing phone, follow this procedure.

To pickup a call using the Spherical Desktop

Figure 3.15 Pickup icon



- 1 Click Pickup to open the "Pickup a ringing call" window.
- 2 Click Pickup immediately.
or
Switch to another Pickup Group "area" by clicking the arrow next to the list box.
- 3 Select the ringing extension from the drop-down list box.

Note: You may also choose an extension to pick up by clicking Extensions.

You should now be connected to the person dialing the other person's desk.

or

- 4 Right-click the extension that you wish to pick up.
- 5 Select Pickup.

You should now be connected to the person dialing the other person's desk.

To pickup a call using the phone set

- 1 Dial *92 from your telephone keypad.

This retrieves a call that is ringing within your geographical Group Pickup area.

To pickup a call ringing at a particular extension






- 1 Dial *93 then the extension.

FIRST DAY SETUP CHECKLIST

Use the following checklist to review and set up your Spherical Desktop options.

<input type="checkbox"/>	Open Spherical Desktop on the computer: Start\Programs\Spherical\Desktop.
<input type="checkbox"/>	Define your personal details: Configure\Options\General Tab, Details. <i>(This should be done immediately.)</i> <ul style="list-style-type: none"> • Type your name
<input type="checkbox"/>	Set up General tab options: Configure\Options\General Tab. <ul style="list-style-type: none"> • Tool Bar Style • Default Type of Transfer (Review Attended Transfer/Blind Transfer) • Keyboard Layout • Personal Details • Show splash screen (when opening Spherical Desktop) if desired
<input type="checkbox"/>	Set up Calls tab options: Configure\Options\Calls Tab. Set your preferences for: <ul style="list-style-type: none"> • Incoming Calls • Outgoing Calls • General Options
<input type="checkbox"/>	Set up Phonebook tab options: Configure\Options\Phonebook Tab. Set your preferences for: <ul style="list-style-type: none"> • Default Tree Entries • Number Entries
<input type="checkbox"/>	Set up Recent Calls tab options: Configure\Options\Recent Calls Tab. <ul style="list-style-type: none"> • Select the appropriate options

FIRST DAY SETUP CHECKLIST

	Set up Extensions tab options: Configure\Options\Extensions Tab. Set up preferences for: <ul style="list-style-type: none"> • Sorting • Display • Mouse Action
	Set up Outlook tab options: Configure\Options\Outlook Tab. Set up preferences for: <ul style="list-style-type: none"> • Incoming Calls • Outgoing Calls • Journal • Contact Groups
	Set up Forwarding: Configure\Forwarding. <ul style="list-style-type: none"> • Forwarding - Temporary Forwarding • Coverage - For your work group • Fallback Coverage - After X number of rings, Enable to go to Voice Mail, set number of rings • Click Help to print the Help information from this window if necessary
	Practice Minimizing, Closing, and Exiting the Spherical Desktop.
	Review Spherical Desktop sections: <ul style="list-style-type: none"> • <i>Calls and the Call icon</i> • <i>Hold</i> • <i>Help</i> • <i>Phonebook</i> • <i>Extensions</i> • <i>Drag and Drop Transfer or Double-click Transfer</i> • <i>Pickup</i> • <i>Folders</i> • <i>Recent Callers</i> • <i>Do Not Disturb</i> • <i>Conference</i>

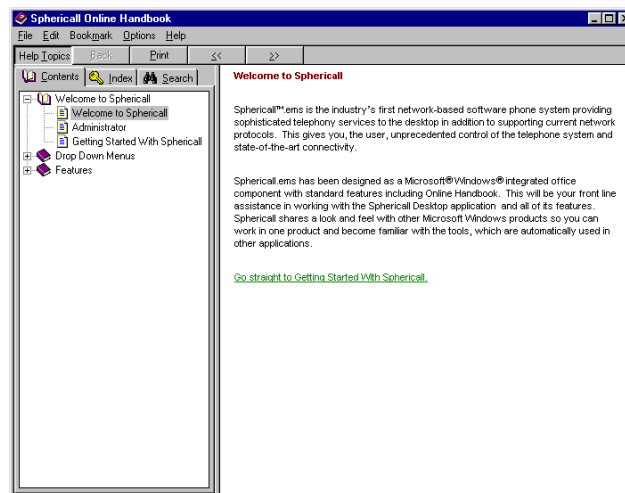
HELP AND ONLINE HANDBOOK

A

ONLINE HELP

Think of your Help files for the Spherical Desktop as the online handbook. Help is always available from the Help menu or from Help buttons located on some of the command windows.

Figure A.1 Help menu



The Help files allow you to answer your own questions on using Spherical Desktop. Refer to the Spherical Desktop Phone Keypad Tips card for further instructions on phone set commands. Refer to your voice mail vendor reference guide for voice mail instructions.

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